

# State of Wisconsin

## Department of Administration

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# Catastrophic Leave Donation

## Job Aid

Version 4.0

### Version History

Version	Date	Editor	Description
1.0	3/29/16	Ashley Price	Initial Release
2.0	9/26/18	Stacie Happel	Update - Unpublished
3.0	11/25/20	Brenda Williams	Update
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## Table of Contents

<b>ENTERING LEAVE DONATIONS</b> .....	<b>3</b>
<i>Navigate to the Initiate Requests Screen</i> .....	4
<i>Enter Donation Details</i> .....	4
<i>Enter Receiving Details</i> .....	5
<b>REVIEWING LEAVE DONATIONS</b> .....	<b>7</b>
<i>Option 1: Review by Donor or Recipient Balance</i> .....	7
<i>Option 2: Review by Donation Transaction</i> .....	10
<b>ADJUSTING LEAVE DONATIONS</b> .....	<b>12</b>
<i>Step 1: Navigate to the Adjust Leave Program Balances screen</i> .....	12
<i>Step 2: Enter the required adjustments</i> .....	12
<b>APPLYING DONATIONS TO A PRIOR PAY PERIOD</b> .....	<b>15</b>
<b>DONATING VACATION CARRYOVER</b> .....	<b>177</b>
<b>YEAR END DONATIONS</b> .....	<b>198</b>
<b>NO LEAVE DONATIONS PROCESSED IN A SPLIT PAY PERIOD</b> .....	<b>199</b>

**Role:** Agency Absence Management Specialist

## NOTES ON USING THIS GUIDE

- [ER 18.15 Catastrophic Leave](#)
- [WI Human Resources Handbook Chapter 660 Catastrophic Leave Program](#)
  - [Donor Authorization for Catastrophic Leave](#)
  - [Application for Catastrophic Leave](#)
- The first steps in the Catastrophic Leave process are the employee in need of the donations (recipient) completes an *Application for Catastrophic Leave*, and the employees donating leave (donors) completes the *Donor Authorization for Catastrophic Leave* form. Once these are approved, they are forwarded to the agency's absence management specialist for processing in the STARS/HCM (system).
- Best practice is to enter the donation into the system at the time it is needed by the recipient. We suggest not processing more than 1 to 2 pay periods at a time. Once the "donation process" is run in the system the donor's specific leave balance will decrease and the recipient's vacation balance will increase. If the donor uses the leave prior to the donation being processed in the system, the donation is nullified.
  - Donations made to a recipient is always shown as vacation.
    - Once the "donations process" has run and the recipient's vacation balance has increased, the vacation takes can be made on the recipient's timesheet.
  - Donations made by a donor is shown in the Leave Program of the actual leave type being donated.

Leave Program	Description	Descr
CASTLEGAL	United States	Legal Holiday Donation
CASTPERHOL	United States	Personal Holiday Donation
CASTSABB	United States	Sabbatical Donation
CASTVAC	United States	Vacation Donation

- Leave Donation process runs 3 times during payroll processing week approximately: 8 am Monday, 10 pm Monday & 11:30 am Tuesday.

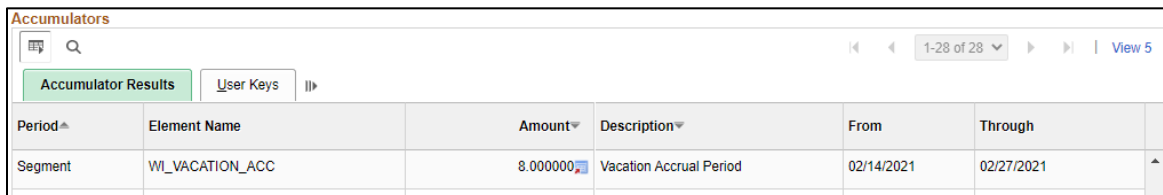
## ENTERING LEAVE DONATIONS

The Catastrophic Leave program enables employees (donors) to transfer leave from their accrued leave hours to other employees (recipients) who have exhausted their own leave due to a qualifying emergency in accordance with ER18.15 (Catastrophic Leave).

There is no security for recipient but there is for the donor. The donating agency must make the entry. An entry is required for both the donor and the recipient.

A recipient may not use more than 80 hours of leave or the number of hours consistent with their regularly scheduled hours per pay period. **Each pay period**, including the beginning of a new calendar year, leave credits earned/accrued by recipient shall be used prior to using the donated leave credits.

The recipient must use all available sick leave and have a leave balance of no more than 16 hours of combined **“accrued”** vacation, including sabbatical/termination leave, and personal/legal holiday credits. *This does not mean the employee must use all awarded vacation but use all earned/accrued vacation.* Accrued vacation can be seen on the Results by Calendar Group screen under the Accumulators tab.

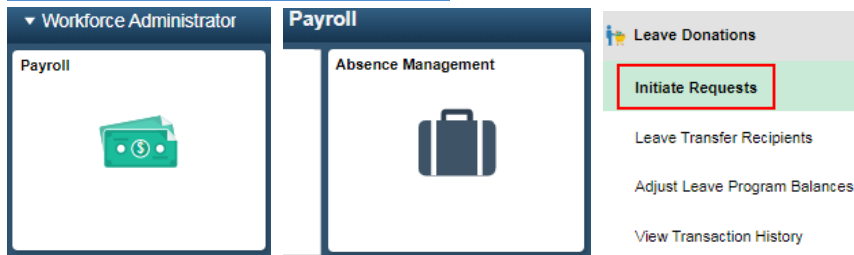


Period▲	Element Name	Amount▼	Description▼	From	Through
Segment	WI_VACATION_ACC	8.000000	Vacation Accrual Period	02/14/2021	02/27/2021

A recipient is eligible to be paid for any legal holiday which falls during a pay period in which donated leave is used for either the last scheduled workday immediately preceding or the first scheduled workday immediately following the holiday.

Note: We do not run the Leave Donation process in the 2 split pay periods, which occur mid-year June and end of year December. You need to process your donations in the system the pay period prior to the split if there are sufficient leave donations. Otherwise, the donations will process in the pay period following the split and an absence adjustment will be required to move the donations to the split pay period. This means the recipient will not be able to be paid in the split pay period but paid retroactively in the following pay period.

## Navigate to the Initiate Requests screen



Click **Search**

- From the Search Results list, select the *Leave Program* that matches the type of leave being donated

The screenshot shows the 'Initiate Requests' search screen. The search criteria are set to 'Country: USA' and 'Leave Program: begins with'. The search results list shows four options: 'CASTLEGAL' (United States Legal Holiday Donation), 'CASTPERHOL' (United States Personal Holiday Donation), 'CASTSABB' (United States Sabbatical Donation), and 'CASTVAC' (United States Vacation Donation). The 'Search' button is highlighted.

The [Initiate Requests screen](#) will appear.

- In the **Request Date** field enter the first day of the current pay period.
- In the **Empl ID** and **EMPL Rcd** fields enter the data of the donor.
- In the **Request Type** field select *Donate* from list.
- In the **Hours** field, enter the number of whole hours being donated.
  - Be Cautious:** The maximum leave an employee can donate in a calendar year is 24 hours. The system will allow you to enter more than 24 hours in the Initiate Request screen. The audit is built into this system at time of the “leave donation process” being run. If you enter more than 24 hours of donation from an employee in a calendar year it will cause a fatal error during absence processing.

Go to the Donor’s Results by Calendar Group screen to see if the employee already donated this year.

Year to Date	WI_DON_LEGAL_BAL	0.000000	Donation Leave Legal HOL
Year to Date	WI_DON_PERHO_ADJ	8.000000	Donation Leave Personal HOL
Year to Date	WI_DON_PERHO_BAL	8.000000	Donation Leave Personal HOL
Year to Date	WI_DON_SABB_ADJ	16.000000	Donation Leave Sabbatical
Year to Date	WI_DON_SABB_BAL	16.000000	Donation Leave Sabbatical
Year to Date	WI_DON_VAC_BAL	0.000000	Donation Leave Vacation

- Click **View Details**

The screenshot shows the 'Initiate Requests' screen with the following details: Country: USA, United States; Leave Program: CASTVAC; Description: Vacation Donation; Leave Program Category: Individual; Leave Program Type: Voluntary; Available Balance: 7022.76. The request is for a 'Donate' type with 0 hours. The 'View Details' button is highlighted.

The [Request to Donate Leave screen](#) will appear. Under the Leave Contribution section enter the following:

1. In the **From Entitlement** field select the *leave type*. This should match the type of leave being donated.
2. In the **Hours to Donate** field verify the hours displayed populated correctly from the previous screen. If hours were not entered on the previous screen, they can be entered in this field.
3. In the **Recipient Type** field select *Employee* from the list.
4. In the **Name** field, select the *Recipient* from the list of employees.
  - a. All State employees are included in the list. Type in the recipient's last name, first initial of first name; click on the Look Up icon in the Name field. Select the employee who is the recipient of the donation.
  - b. There is no security for the recipient, so if the donor is from a different agency the donating agency will have no issue selecting the recipient.
5. Click **OK**

[illegible]

You will be taken back to the Initiate Requests screen:

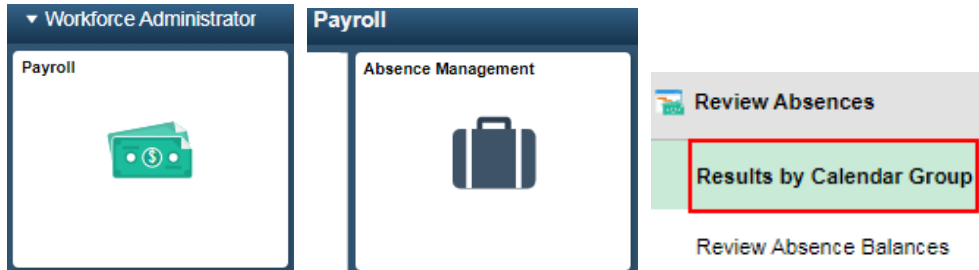
- ✓ To enter additional donations from other employees for the same leave type, click **Add a Row (+)** and repeat the entry steps.
  - ✓ To enter additional donations for a different leave type, click **Save**, then click **Return to Search** and you will be taken to the Initiate Requests screen. Go back to the Initiate Requests screen instructions above, and select a new Leave Program, and repeat the entry steps.
  - ✓ After all leave donations have been entered, click **Save**. The leave balances will not update until the “leave donation process” is run by DOA Central Payroll.
- **RESULTS:** The “leave donation process” is run before each absence calculation during processing week. Once this process has been run to success, the vacation is available to use on the recipient’s timesheet for the pay period being processed.
- Approximate run times: 8 am Monday, 10 pm Monday & 11:30 am Tuesday

## REVIEWING LEAVE DONATIONS

### Option 1: Review by Donor or Recipient Balance on the Results by Calendar Group screen

- ✓ To confirm the donations for both the donor(s) and the recipient, you can review the Results by Calendar Group screen for the pay period that is currently being processed. The leave balances will not update until the “leave donation process” is run by DOA Central Payroll.

- Navigate to the **Results by Calendar Group** screen



- Enter the **Empl ID** for the donor or recipient you want to review.
  - Click **Search**
  - From the Search Results list, select the *Calendar Group ID* that has most recently been processed.

The screenshot shows the 'Results by Calendar Group' search screen. It includes a search criteria section with fields for 'Empl ID', 'Empl Record', 'Calendar Group ID', and 'Name'. The 'Empl ID' field is highlighted with a red box. Below the search criteria, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. The 'Search' button is highlighted with a red box. Below the search criteria, there is a 'Search Results' section with a table of results. The table has columns for 'Empl ID', 'Empl Record', 'Calendar Group ID', and 'Name'. The 'Calendar Group ID' column is highlighted with a red box. The table shows results for '2016B01' through '2016B06' and 'CONVERSION'.

Empl ID	Empl Record	Calendar Group ID	Name
10		2016B01	
10		2016B02	
10		2016B03	
10		2016B04	
10		2016B05	
10		2016B06	
10		CONVERSION	

➤ Review adjustments and balances

1. Click the **Accumulators** tab
2. Verify that you are reviewing the Calendar ID in which the donations were submitted
3. Click the **View All** link to see all Accumulators processed for the period. Click on the Header *Description*, to sort by leave types.

✓ If reviewing a DONOR:

- A total leave balance displays with Element Name WI TOTAL DONATION

Year to Date	WI TOTAL DONATION	24.000000	DONOR AMOUNT
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- A leave balance (WI\_DON\_xxx\_BAL) and leave adjustment (WI\_DOC\_xxx\_ADJ) display for the specific type(s) of donated leave

Year to Date	WI_DON_LEGAL_BAL	0.000000	Donation Leave Legal HOL
Year to Date	WI_DON_PERHO_ADJ	8.000000	Donation Leave Personal HOL
Year to Date	WI_DON_PERHO_BAL	8.000000	Donation Leave Personal HOL
Year to Date	WI_DON_SABB_ADJ	16.000000	Donation Leave Sabbatical
Year to Date	WI_DON_SABB_BAL	16.000000	Donation Leave Sabbatical
Year to Date	WI_DON_VAC_BAL	0.000000	Donation Leave Vacation

- Leave donations are not listed as a take (USED) but the balance does reduce

Year to Date	WI_PER_HOL_BAL	0.000000	Personal Holiday Balance
Year to Date	WI_PER_HOL_ENT	36.000000	Personal Holiday Award
Year to Date	WI_PER_HOL_TAKE	28.000000	Personal Holiday Used
Year to Date	WI_SABBATCL_BAL	613.750000	Sabbatical Leave Balance

✓ If reviewing a RECIPIENT:

- A leave balance displays with Element Name WI RECIPIENT, WI\_REC\_VAC\_ADJ and WI\_REC\_VAC\_BAL

PP19:

Year to Date	WI RECIPIENT	432.000000	Recipient Accumulator
Year to Date	WI_REC_VAC_ADJ	432.000000	Receive Donation Vacation
Year to Date	WI_REC_VAC_BAL	432.000000	Receive Donation Vacation

PP20:

Year to Date	WI RECIPIENT	523.000000	Recipient Accumulator
Year to Date	WI_REC_VAC_ADJ	523.000000	Receive Donation Vacation
Year to Date	WI_REC_VAC_BAL	523.000000	Receive Donation Vacation

- WI\_VACATION\_BAL (Vacation Balance) displays an increase

PP19:

Year to Date	WI_VACATION_BAL	0.620000	Vacation Balance
Year to Date	WI_VACATION_ENT	120.000000	Vacation Award
Year to Date	WI_VACATION_TAKE	550.000000	Vacation Used

PP20:

Year to Date	WI_VACATION_BAL	91.620000	Vacation Balance
Year to Date	WI_VACATION_ENT	120.000000	Vacation Award
Year to Date	WI_VACATION_TAKE	550.000000	Vacation Used

- This employee received 91 hours of donation in PP20
- WI RECIPIENT, WI\_REC\_VAC\_ADJ, WI\_REC\_VAC\_BAL, and WI\_VACATION\_BAL all increased by 91 hours from PP19
- Use the WI\_ABS\_MANUAL\_ADJUSTMENTS query to see the donations by employee.

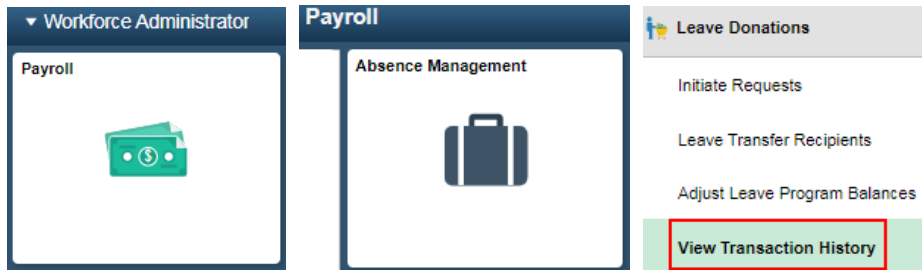
Pay Group	Dept ID	Calendar ID	ID	ER	Last	First Name	HR Status	PIN Number	Name	Begin Date	End Date	Bal adj	by	Last Upd DtTm
WI	250166	2018B20	WI_REC_VAC	0	WI	250166	WI	250166	WI_REC_VAC	09/02/18	09/15/18	3.000000	WI_AM_BATCH	9/17/2018 8:52
WI	250166	2018B20	WI_REC_VAC	0	WI	250166	WI	250166	WI_REC_VAC	09/02/18	09/15/18	24.000000	WI_AM_BATCH	9/17/2018 8:52
WI	250166	2018B20	WI_REC_VAC	0	WI	250166	WI	250166	WI_REC_VAC	09/02/18	09/15/18	8.000000	WI_AM_BATCH	9/17/2018 8:52
WI	250166	2018B20	WI_REC_VAC	0	WI	250166	WI	250166	WI_REC_VAC	09/02/18	09/15/18	8.000000	WI_AM_BATCH	9/17/2018 8:52
WI	250166	2018B20	WI_REC_VAC	0	WI	250166	WI	250166	WI_REC_VAC	09/02/18	09/15/18	24.000000	WI_AM_BATCH	9/17/2018 8:52
WI	250166	2018B20	WI_REC_VAC	0	WI	250166	WI	250166	WI_REC_VAC	09/02/18	09/15/18	8.000000	WI_AM_BATCH	9/17/2018 8:52
WI	250166	2018B20	WI_REC_VAC	0	WI	250166	WI	250166	WI_REC_VAC	09/02/18	09/15/18	16.000000	WI_AM_BATCH	9/17/2018 8:52
												91.000000		



## Option 2: Review by Donation Transaction screen

To review all donations from the donor(s) or any leave donation adjustments, you can review the Transaction History for each Leave Program. You can see who the recipient of the donation by clicking on the PI Entries field, under the Generated PI Entries screen.

### ➤ Step 1: Navigate to the View Transaction History screen



- Click **Search**
- From the Search Results list, select the *Leave Program* that matches the type of leave being reviewed

The screenshot shows the 'View Transaction History' search interface. At the top, there is a search bar with the text 'Find an Existing Value'. Below it, there is a 'Search Criteria' section with two dropdown menus: 'Country' (set to 'begins with USA') and 'Leave Program' (set to 'begins with'). Below these are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. The 'Search' button is highlighted with a red rectangular box. Below the search criteria, there is a 'Search Results' section with a table of results. The table has columns for 'Country', 'Leave Program', 'Description', and 'Deser'. The results are as follows:

Country	Leave Program	Description	Deser
USA	CASTLEGAL	United States Legal Holiday Donation	
USA	CASTPERHOL	United States Personal Holiday Donation	
USA	CASTSABB	United States Sabbatical Donation	
USA	CASTVAC	United States Vacation Donation	

### Step 2: Review the Leave Program donations

- Submitted donations for that Leave Program will display.
- Selection Criteria can be used to narrow results if you are looking for a particular donor or donations/adjustments for a particular period. If looking for a specific donor be sure to enter the Empl ID in both the From and To fields.

The screenshot shows the 'View Transaction History' results page. At the top, there is a summary of the search criteria: 'Country USA United States', 'Leave Program CASTLEGAL', 'Description Legal Holiday Donation', 'Program Category Individual', 'Program Type Voluntary', 'Contribution Type One-Time', 'Program Balance 0.000000', and 'Unit Type Hours'. Below this is a 'Selection Criteria' section with a red border. It contains fields for 'From Date', 'To Date', 'Request Type', 'Transaction Status', 'Empl ID From', and 'Empl ID To'. Below these fields are buttons for 'Select with Matching Criteria' and 'Clear All'. At the bottom, there is a 'Leave Transfer Transaction Information' section with a table of transaction details. The table has columns for 'Empl ID', 'Job', 'Name', 'Request Type', 'Hours', 'Date Submitted', 'Recipient Empl', 'Workflow Status', and 'Termination Date'. The first row shows 'Empl ID' as '0'.

Empl ID	Job	Name	Request Type	Hours	Date Submitted	Recipient Empl	Workflow Status	Termination Date
0								

**Step 3:** Expand to See Donor Emp ID and Transactions Status.

**View Transaction History**

Country: USA United States  
 Leave Program: CASTVAC Description: Vacation Donation  
 Program Category: Individual Program Type: Voluntary  
 Contribution Type: One-Time Program Balance: 22316.570000 Unit Type: Hours

**Selection Criteria**

From Date: 01/01/2021 To Date: 02/05/2021  
 Request Type: Transaction Status:  
 Empl ID From: Empl ID To:  
 Select with Matching Criteria Clear All

**Leave Transfer Transaction Information**

1-32 of 32 View 2

Empl ID	Job	Name	Request Type	Hours	Date Submitted	Recipient Emplid	Workflow Status	Termination Date	PI Entries	Transaction Status	Process Date
	0		Donate	8.00	01/19/2021		Approved		PI Entries	Processed	01/19/2021

Click on the PI Entries field to bring up the Generated PI Entries screen, which provides the recipient's Empl Id.

**Positive Input Details**

Generated PI Entries

1-2 of 2 View All

Entitlement Details Calendar Details

	Empl ID	Empl Record	Element Name	Description	Balance Adjustment
1		0	WI_REC_VAC	Receive Donation Vacation	8.000000
2		0	WI_DON_VAC	Donation Leave Vacation	8.000000

OK Cancel

## ADJUSTING LEAVE DONATIONS

Adjustments can be made to leave donations that have already been submitted.

### Step 1: Navigate to the Adjust Leave Program Balances screen



- USA populates into the **Country** field
- In the **Leave Program** field, from the Search Results list, select the *Leave Program* that matches the type of leave being adjusted.

The 'Look Up Leave Program' interface shows a search form with 'Country' set to 'USA' and 'Leave Program' set to 'begins with'. Below the form are buttons for 'Look Up', 'Clear', 'Cancel', and 'Basic Lookup'. The 'Search Results' section shows a table with 4 results:

Leave Program	Description	Descr
CASTLEGAL	United States Legal Holiday Donation	
CASTPERHOL	United States Personal Holiday Donation	
CASTSABB	United States Sabbatical Donation	
CASTVAC	United States Vacation Donation	

- Click **Add** once the Leave Program is selected.

The 'Adjust Leave Program Balances' form shows a green 'Add a New Value' button at the top. Below it, the 'Country' field is set to 'USA' and the 'Leave Program' field is set to 'CASTLEGAL'. At the bottom, there is a green 'Add' button.

## Step 2: Adjust Leave Program Balances screen

- In the **Adjustment Date** field enter the first day of the current pay period.
- DO NOT ENTER IN THE ADJUST BANK BALANCE SECTION.
- In the **Empl ID** field enter data of the person being adjusted
- In the **Empl Rec** field, if not zero
- In the **Target Entitlement** field
  - When adjusting the donor's original donation, select *Donation Leave (Leave Program)*.
    - If Donation Leave is anything other than vacation, you will have to navigate back to the **Adjust Leave Program Balances** screen and enter a new Leave Program for Vacation before adjusting the recipient's.
  - When adjusting the recipient's original amount, select *Receive Donation Vacation*.

NOTE: An entry is required for both the donor *and* the recipient. In rare instances, if you entered only the donation for the donor and never entered the recipient, you can reduce only the donor at this time.

- In the **Adjustment Hours** field enter the whole number of hours you want to decrease by.  
(This should usually be a negative amount for both participants. In rare instances if a negative donation balance is showing, you would enter a positive amount to clear it.)
- Enter a **Reason** (optional)
  - Examples:
    - Recipient no longer in need of donations.
    - Original entry keyed in error.
    - Donation sent to wrong recipient.
- Click **Save**

**RESULTS:** After the Absence Calculation runs, the donor and recipient balances are adjusted.

Adjust Leave Program Balances

Country USA United States

Leave Program CASTLEGAL Description Legal Holiday Donation

Available Balance 0.00 \*Adjustment Date 03/21/2016

Adjustment Hours Reason

**DO NOT USE**

Adjust Individual Balances

Employee ID Record Target Entitlement Adjustment Hours View Employee Balances Reason

Updated on 03/21/2016 12:05:34PM Updated By NICESKYOYOB

Save Add

- ✓ To enter additional adjustments for the same leave program, click **Add a Row (+)** button and repeat the previous steps. When done click the Save button.
- ✓ To enter additional adjustments for a different leave program, navigate back to the **Adjust Leave Program Balances** screen and enter a new Leave Program and complete the previous steps.

Adjust Leave Program Balances

Add a New Value

Country USA

Leave Program

Example of keying error. The Empl Id of the recipient was used for both the donor and the recipient. The process took 16.0 hours of Legal Holiday from the employee and gave 16.0 hours of vacation to the same employee.

The screenshot shows the 'Absence Management' interface. The 'View Transaction History' section displays filters for Country (USA), Leave Program (CASTLEGAL), Program Category (Individual), Contribution Type (One-Time), Description (Legal Holiday Donation), Program Type (Voluntary), Program Balance (1391.500000), and Unit Type (Hours). Below these are search criteria for From Date, To Date, Request Type, Transaction Status, Empl ID From, and Empl ID To. A 'Positive Input Details' window is open, showing 'Generated PI Entries' with two rows:

Empl ID	Empl Record	Element Name	Description	Balance Adjustment
1	0	WI_DON_LEGAL	Donation Leave Legal HOL	16.000000
2	0	WI_REC_VAC	Receive Donation Vacation	16.000000

On the Results by Calendar Group screen the WI\_DON\_LEGAL\_BAL increased for the 16.0 hours. Once the correcting adjustment processes, the balance will be 0.0 hours.

Employee

Empl ID

Empl Record

0

Calendar Group ID

2021B05

February 14 to February 27

Calendar Information

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WI\_REC\_VAC\_BAL was 506.0 hours in PP4. This increased 16.0 hours in PP5. Once the correcting adjustment processes, the balance will decrease by the 16.0 hours back to the 506.0 hours.

Employee

Empl ID

Empl Record

0

Calendar Group ID

2021B05

February 14 to February 27

Calendar Information

Calendar ID

435 2021B05

Pay Group

435

Segment Number

1

Version

1

Revision

1

Gross Result Value

0.00

USD

Net Result Value

0.00

USD

Accumulators

Accumulator Results

User Keys

Period	Element Name	Amount	Description	From	Through
Year to Date	WI_RECPIENT	522.000000	Recipient Accumulator	01/01/2021	12/31/2021
Year to Date	WI_REC_VAC_BAL	522.000000	Receive Donation Vacation	01/01/2021	12/31/2021
Year to Date	WI_REC_VAC_ADJ	522.000000	Receive Donation Vacation	01/01/2021	12/31/2021

To correct, you must enter two absence adjustments using the recipient's Empl Id. Once you have made the correcting adjustments, you can enter the correct donation following the instructions for ENTERING LEAVE DONATIONS above.

Adjust Individual Balances

Employee ID
ABSENCE\_ADJ
Record
0

Target Entitlement
Donation Leave Legal HOL
Adjustment Hours
-16

Reason
keyed in error, recipient donated to herself

Adjust Individual Balances

Employee ID
ABSENCE\_ADJ
Record
0

Target Entitlement
Receive Donation Vacation
Adjustment Hours
-16

Reason
keyed in error, recipient donated to herself

The reason you want to correct both the donor and the recipient is, so they connect to each other under the Review by Donation Transaction screen; on the Generated PI Entries screen.

Positive Input Details					
Generated PI Entries					
<div> Entitlement Details Calendar Details </div>					
	Empl ID	Empl Record	Element Name	Description	Balance Adjustment
1		0	WI_REC_VAC	Receive Donation Vacation	8.000000
2		0	WI_DON_VAC	Donation Leave Vacation	8.000000
<div> OK Cancel </div>					

## APPLYING DONATIONS TO A PRIOR PAY PERIOD

When donations are approved or entered into the system after the fact, you must manually adjust the vacation hours for the recipient to use the vacation in a past pay period. Enter through an Absence Adjustment the amount of vacation needed the pay period prior to the pay period you will be using the hours on the timesheet. Then deduct the vacation hours in the pay period the donations were originally made in. No adjustments are needed for the donor.



Open the original Absence Adjustment the Donation was processed in. In this example the donation was processed in 2021B02

This screenshot shows the 'Absences' search criteria form. The 'Calendar ID' is set to '2021'. The 'Search' button is highlighted. The form includes fields for 'Empl ID', 'Empl Record', 'Pay Group', 'Calendar ID', 'Name', 'Period Begin Date', 'Period End Date', and a 'Case Sensitive' checkbox. The 'Search' button is highlighted in green.

Add a new row, Element Type WI\_Vacation and decrease by the number of full hours you are moving to the prior pay period. In this example we are moving 3.0 hours.

This screenshot shows the 'Absences' form with the 'Balance Adjustments' table. A new row for 'WI\_VACATION' is added, with a balance adjustment of -3.00. The table has columns for 'Element Name', 'Description', 'Balance Adjustment', 'Begin Date', and 'End Date'. The 'WI\_VACATION' row is highlighted with a red rectangular box.

Element Name	Description	Balance Adjustment	Begin Date	End Date
WI_REC_VAC	Receive Donation Vacation	20.000000	01/03/2021	01/16/2021
WI_REC_VAC	Receive Donation Vacation	16.000000	01/03/2021	01/16/2021
WI_VACATION	Vacation	-3.00	01/03/2021	01/16/2021

In the prior pay period add a new row Element Type WI\_Vacation and increase by the number of full hours you are moving to prior pay period. (We need to use the vacation in PP 2021B01, so adding to PP 2020B27.) Once the next Absence Calculation is run, the additional vacation will be available for use on the timesheet.

Absences

Employee ID

Name

Empl Record

0

Pay Group

566

Description

Dept of Revenue

Pay Entity

WISCONSIN

Calendar ID

566 2020B27

Begin Date

12/06/2020

End Date

12/19/2020

This Calendar is finalized. Any changes will be considered during retro processing.

Balance Adjustments

Q

1-8 of 9

View 5

*Element Name	Description	Balance Adjustment	Begin Date	End Date		
WI_REC_VAC	Receive Donation Vacation	14.000000	12/06/2020	12/19/2020	+	==
WI_REC_VAC	Receive Donation Vacation	7.000000	12/06/2020	12/19/2020	+	==
WI_REC_VAC	Receive Donation Vacation	1.000000	12/06/2020	12/19/2020	+	==
WI_REC_VAC	Receive Donation Vacation	1.000000	12/06/2020	12/19/2020	+	==
WI_REC_VAC	Receive Donation Vacation	24.000000	12/06/2020	12/19/2020	+	==
WI_REC_VAC	Receive Donation Vacation	16.000000	12/06/2020	12/19/2020	+	==
WI_REC_VAC	Receive Donation Vacation	4.000000	12/06/2020	12/19/2020	+	==
WI_REC_VAC	Receive Donation Vacation	24.000000	12/06/2020	12/19/2020	+	==
WI_VACATION	Vacation	3.00	12/06/2020	12/19/2020	+	==

Attachments

Q

1-1 of 1

View All

Filename	Description	Date Time Attached	Attached By

Add Attachment

Comments

2/4/21 Late donation moving from Pay Period 2021B02 blow



## DONATING VACATION CARRYOVER

The leave donation process only converts current year vacation to the recipient. If the employee wishes to donate their vacation carryover you must manually add the donation back into the current year vacation bucket and deduct it from the carryover bucket in the same pay period that you key the donation.



In this example the donation was keyed into PP2021B04.

The screenshot shows the 'Absences' form in the 'ABS Admin' system. The form includes fields for Employee ID, Name, Pay Group (505), Description (Dept of Administration), Calendar ID (505 2021B04), Begin Date (01/31/2021), Empl Record (0), Pay Entity (WISCONSIN), and End Date (02/13/2021). A note states: 'This Calendar is finalized. Any changes will be considered during retro processing.'

**Balance Adjustments**

*Element Name	Description	Balance Adjustment	Begin Date	End Date		
WI_VACATION	Vacation	24.000000	01/31/2021	02/13/2021	+	-
WI_CRR_OVR_6	Vacation Carry Over 6 M	-24.000000	01/31/2021	02/13/2021	+	-
WI_DON_VAC	Donation Leave Vacation	24.000000	01/31/2021	02/13/2021	+	-

**Attachments**

Filename	Description	DateTime Attached	Attached By

**Comments**

24 hours of donated CAT leave for [redacted] to be taken from 2020 vacation carryover

## YEAR END DONATIONS

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Only process the donations in the calendar year that are needed in that calendar year, allowing enough for the year end split pay period.

If there are leave donations that are not needed by your recipients at year end, hold those donor forms. Best practice – send an email to the donors letting them know you did not use their current year donations and are holding the donations to be used in the next year and the donation hours will be part of their carryover. If the donation is no longer needed, you should void the Donor Authorization form and let the donor know. Since the donations should not be processed until needed, no adjustment should be required. If the donation was processed in the system, and it is not needed, follow the instructions in the Adjusting Leave Donations section above.

If the donated amount not being used at year end puts the employee over the 40 hours vacation carryover (or using PH or LH) you will need to include the donor employee on the Individual Agency Exception request with the Justification – Catastrophic Leave Donor 202# Balance. If you were not aware of these employees at the time you submit your initial Individual Carryover Exception request, send a second Exception request with the donors listed.

Note: If the donation involving carryover leave has not been processed by the next fiscal year end, an exception should be submitted to DOA CP.

Leave credits donated to a recipient are not subject to limitations on end of year carryover of leave credits. Leave credits donated more than the maximum number of leave credits required for a recipient shall be returned to the donor. Donors shall have the remainder of the calendar year and the first 6 months of the ensuing calendar year in which to use previously donated leave credits returned to the donor during the last 6 months of the calendar year.

From WI Human Resources Handbook Chapter 660:

8. Leave credits donated to recipients are not subject to limitations on end-of-year carryover of leave credits under ss. ER 18.02(6)(b) and ER 18.04(4)(c), Wis. Adm. Code.

**EXAMPLE:** A recipient is on approved unpaid leave and is using donated leave. Donated leave credits remaining at the end of the calendar year will automatically carry over into the ensuing calendar year and will be used until donations are exhausted or the catastrophic need is resolved and any unused donated credits are returned to the donor.

9. Donated leave credits will not be reflected on the recipient's official leave accounting balance until the pay period in which the credits are actually used by the recipient.

## NO LEAVE DONATIONS PROCESSED IN A SPLIT PAY PERIOD

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There are 2 split pay periods each calendar year. One at the end of the year, splitting the calendar years and one in June splitting the fiscal years. These 2 pay periods have 2 absence calendar IDs in the system, distinguished with an A.

Examples:

The split pay periods for 2021:

2021B01 = 12/20/2020 to 12/31/2020

2021B01A = 1/1/2021 to 1/2/2021

2021B14 = 6/20/2021 to 6/30/2021

2021B14A = 7/1/2021 to 7/3/2021

Because these pay periods are split into two calendar ID within each calendar group ID, the leave donation process does not work. Therefore, we DO NOT run the Leave Donation process in these two pay periods.

You need to process your donations in the system the pay period prior if there are sufficient leave donations. Otherwise, you will have to process the donations in the pay period following and then process an Absence Adjustment to move the donations to the prior pay period, which means the recipient will not be able to be paid in the split pay period and will receive retro pay in the following pay period.

If donations are keyed in a split pay period, they will remain unprocessed until the following pay period.